

# District of Columbia Annual Economic Report

# 2008

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District of Columbia Department of Employment Services  
Office of Labor Market Research and Information

July 2011

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## INTRODUCTION

The District of Columbia has long been defined by the presence of the federal government. While the federal government is the single largest employer in District, private sector employers such as those in the professional and business services, finance, and tourism industries provide the foundation for high-wage jobs in the District.

The federal presence provided a measure of insulation from one of the nation's worst economic declines, but the District was not completely immune. The recession of 2008 was recorded as the longest and deepest since the Great Depression. The economic crisis impacted the District's job and labor markets unevenly, resulting in job losses for many city residents while the supply of jobs remained relatively stable.

This analysis provides a detailed description of the District's economy during 2008, including a review of the labor pool, labor market context, and long-term employment forecasts that indicate emerging trends and opportunities. More specifically, it addresses such questions as: *1) How did the economic downturn affect the District's economy? 2) What were effects on employment by sector? 3) What are the current and projected demographics of the available labor pool?*

The Department of Employment Services (DOES) submits this report in fulfillment of its commitment to providing past year as well as current information. It was prepared in accordance with guidelines from the U.S. Department of Labor, Employment and Training Administration (ETA), Program Year 2009 Workforce Information Grant to aid District of Columbia policy makers, the District of Columbia Workforce Investment Council, and DOES program managers and administrators of workforce development programs.

## HIGHLIGHTS

- In 2008, the District's resident labor force rose to 332,703 as the number of employed residents increased by 6,046 to 309,528. At the same time, the number of unemployed residents increased by 4,026 to 23,175. As a result, the unemployment rate rose 1.1% to 7.0%<sup>1</sup>.
- The U.S. Census Bureau's (U.S. Census) 2008 population estimate for the District was 591,833. Women represented 53% of the population as compared to 51% nationally; the population 18 years and over increased to 479,817 while the median age remained at 35 years of age<sup>2</sup>. The District has a lower percentage of unemployed seniors aged 65 and over than the national average. Census data also show that as the District population increased, the racial makeup became more diverse.
- From the start of the recession in December 2007 to December 2008, the national seasonally unadjusted jobless rate rose 47.9%, from 4.8% to 7.1%, while the District's seasonally unadjusted unemployment rose from 5.6% to 8.9%. First time unemployment initial claims in the District increased by 84% and continued claims rose by 41%, compared to 26% and 33% for the nation, respectively.
- The U.S. Census American Community Survey (ACS) data showed that in 2008 the average household income in the District was \$57,936 compared to \$52,029 for the nation. However, the percentage of individuals below the poverty level in the District was also higher than the national average, at 17.2% compared to 13.2% nationally.
- Educational attainment among District residents was above the national average, especially with regard to college graduates. In 2008, 85.8% of District residents 25 years and over were high school graduates, and 48.2% held bachelor's degrees, compared to 85% and 29.5%, respectively for the nation.
- For the tenth consecutive year, non-farm payroll employment registered year-over-year job gains. In 2008, the number of wage and salary jobs in the District rose by 10,000 jobs to 704,800. Private sector employment made up 66% of total city employment, and the federal government was 27%, as compared to 2% in the U.S. percentage.
- In the first quarter of 2008, there were 34,363 private business establishments employing 444,365 workers in the District. Nearly 82% of these establishments employed fewer than 10 workers. Establishments employing 1,000 or more workers constituted more than 13% of all private sector jobs, despite comprising less than 0.1% of all private sector establishments. In 2008, the average weekly wages of workers in the District increased 3.9% to \$1,470. Nationally, the annual average weekly wage rose 2.5% to \$876.
- According to the Bureau of Labor Statistics, the District experienced a modest net job loss of 23,571 jobs between the years 2000 and 2008. In 2008, the number of job gains from expanding and opening private sector establishments in the District was 109,476, and the number of job losses from contracts and closed establishments was 110,038, resulting in a net loss of 562 jobs.
- The top three occupational groups in the District were "office and administrative support," "business and financial operations," and "management," accounting for 39.6% of total employment in 2008. In

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<sup>1</sup> U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics (LAUS)

<sup>2</sup> Population Division, U.S. Census Bureau, Annual Estimates of the Population by Age and Sex

2008, the occupational group with the largest number of employees in the District and the nation was “office and administrative support,” which accounted for 101,840 jobs (16%) in the District and 17.2% of total employment in the nation. The single occupation with the most employed and highest wage in the District was “lawyers” with an employment level of 28,960 and annual average wage of \$143,560, compared to annual average wage of \$124,750 in the nation.

- In 2008, 12 of the top 20 employers in the District were either universities or hospitals, with Georgetown University, Washington Hospital Center, George Washington University, Children’s National Hospital, and Howard University ranked as the top five private sector employers in the District

## I. JOB MARKET ANALYSIS

### Employment (Non-farm) Payroll

Employment in the District continued to be primarily service-based in 2008. Medium-wage career clusters accounted for more than 78% of employment, with more than half the jobs in occupations requiring at least a post-secondary degree. In 2008, total non-farm wage and salaried employment in the District grew by 10,000 jobs, or 1.6%, to 704,800<sup>3</sup>. Table 1 shows 1995 – 2007 total non-farm employment annual estimates for the U.S. and the District of Columbia.

Table 1: Total Non-farm Employment for DC and US, 1995 - 2008*				
	Employment	Over-Year Change	Over-Year% Change	
Year	D.C.	D.C.	D.C.	U.S.
1995	642,600		-2.44	2.63
1996	623,000	-19,600	-3.05	2.05
1997	618,400	-4,600	-0.74	2.56
1998	613,500	-4,900	-0.79	2.57
1999	627,400	13,900	2.27	2.43
2000	650,200	22,800	3.63	2.16
2001	653,700	3,500	0.54	0.03
2002	664,200	10,500	1.61	-1.13
2003	665,500	1,300	0.20	-0.26
2004	674,200	8,700	1.31	1.10
2005	682,200	8,000	1.19	1.73
2006	687,600	5,400	0.89	1.78
2007	694,800	7,200	0.90	1.12
2008	704,800	10,000	1.60	-0.40
Note: * Annual Averages (Not Seasonally Adjusted)				
Source: Bureau of Labor Statistics, Current Employment Statistics (CES)				

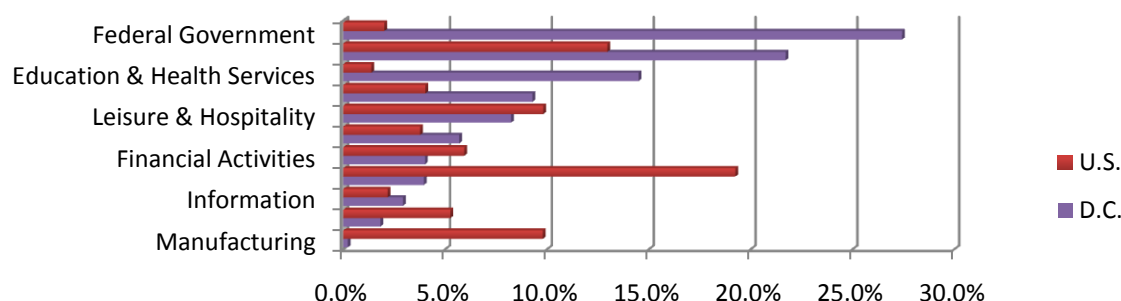
The data show 10 years of uninterrupted job growth from 1999 to 2008. The nation experienced growth of over 2% in total non-farm employment in the 1990s through 2000. The District's supply of jobs was resilient, while the national economy experiences a sharp downturn. For example, in 2002, the District's non-farm payroll employment increased by 10,500 jobs, or 1.61%, while the nation's rate declined by 1.13%. The same pattern is noted in the current recession.

### District of Columbia Industry Share of Non-farm Payroll Employment

In 2008, total non-farm employment in the District was 704,800. Private sector jobs made up 66% of the total with employment of more than 462,800 workers. Federal government employment was 27% and 19,000 workers, as compared to 2% in the U.S. (See Figure 1). Private sector employment in the District was concentrated in four major industry sectors which together made up over half of the total non-farm employment: professional and business services (22%), educational and health (15%), other services except public administration (9%), and leisure and hospitality (8%). The sectors with higher employment shares in the U.S. were trade, transportation, and utilities with 19%, manufacturing with 10%, and construction with 5% as compared to 4%, 0.2%, and 2% in the District, respectively.

<sup>3</sup> U.S. Bureau of Labor Statistics, Current Employment Statistics (CES)

**Figure 19: Percent Share of Total Non Farm Employment by Industry, 2008**  
(not seasonally adjusted)



Source: U.S. Bureau of Labor Statistics, Current Employment Statistics (CES)

### **Wage and Salary Employment by Major Industry Sectors**

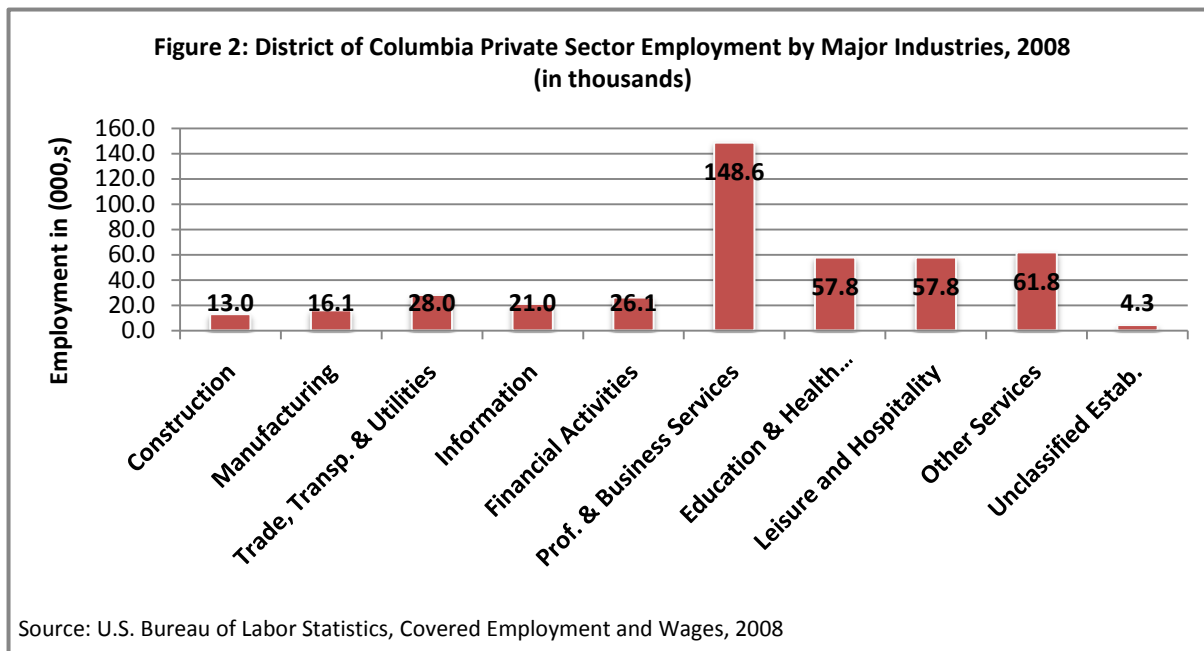
In general, the District and surrounding metropolitan jurisdictions continued to enjoy some of the highest wages and salaries in the country. The District's average weekly wage for all industries in 2008 was \$1,470 compared to \$876 for the U.S. nation (68% above the U.S. average weekly wage). About 13.0% of families and 16.4% of the population were below the poverty line.

The 2008 District of Columbia Quarterly Census of Employment and Wages (QCEW) data in Table 2 and Figure 2 show that the private sector made up over 66% of all wage and salary employment, 99% of all establishments, and 62% of the total wage. Of 453,522 jobs in the private sector, 60% were in service-producing industries. Four industry sectors – professional and business services, educational and health services, leisure and hospitality, and other services – had 359,892 workers, which represented over 80% of private sector employment. While the federal government represented only 1% of all establishments, it accounted for more than 28% of total employment and provided over 33% of the total wages in the District.

**Table 2: D.C. Wage and Salary Employment by Major Industry Sectors, 2008 Annual Averages**

Industry	Number of Firms	% Share of Firms	Average Employment	% Share of Employment	Total Wage (\$m)	% Share of Wage
<b>Total, All Industries</b>	<b>33,965</b>		<b>685,858</b>		<b>\$52,443.18</b>	
Government	334	1.0	232,338	33.9	\$20,155.69	38.4
Federal Government	293	0.9	193,676	28.2	\$17,598.41	33.6
State Government	41	0.1	38,662	5.6	\$2,557.28	4.9
Construction	1,024	3.0	12,957	1.9	\$722.86	1.4
Manufacturing	193	0.6	1,610	0.2	\$124.46	0.2
Trade, Transportation & Utilities	3367	9.9	27972	4.1	\$1,354.49	2.6
Information	933	2.7	20671	3.0	\$2,149.74	4.1
Financial Activities	2162	6.4	26128	3.8	\$2,771.39	5.3
Prof. & Business Services	9737	28.7	148585	21.7	\$13,860.54	26.4
Education & Health Services	2520	7.4	91750	13.4	\$4,891.48	9.3
Leisure and Hospitality	2416	7.1	57764	8.4	\$1,822.40	3.5
Other Services	8914	26.2	61793	9.0	\$4,284.02	8.2
Unclassified	2366	7.0	4292	0.6	\$306.10	0.6

Source: Bureau of Labor Statistics, Quarterly Census of Employment & Wages, 2008



In the first quarter of 2008, there were 34,363 business establishments employing 444,365 workers in the District's private sector; nearly 82% of these establishments employed fewer than 10 workers; establishments employing 1,000 or more workers constituted more than 13% of all private sector jobs, despite comprising less than 0.1% of all private sector establishments.

#### **Private Sector Employment by Zip Codes, Fourth Quarter 2008**

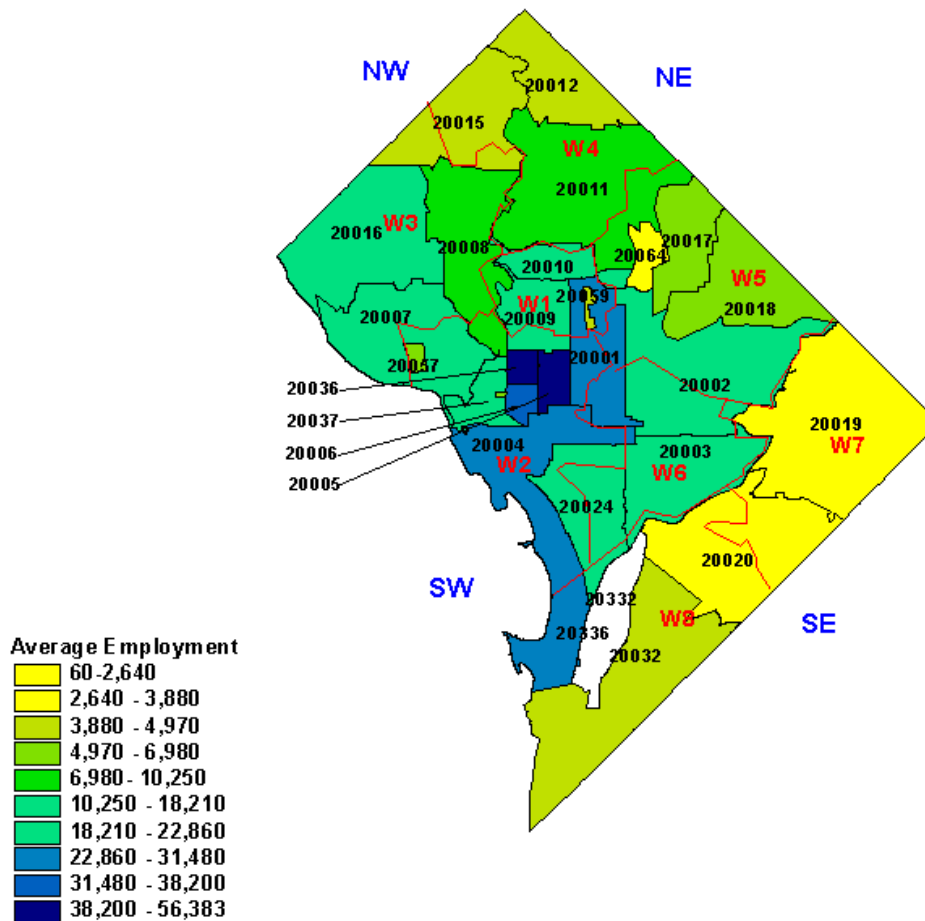
In the fourth quarter of 2008, more than 34,000 private establishments in the District employed over 455,000 workers and generated more than \$8.7 billion in total wages. Table 3 and Figure 3 provide employment information by zip code, which offers a reliable method of analyzing data across the District's geographic bounds. This data are important as it illustrates the economic disparity that exists across the city. Areas in Northwest and Southwest have high employment concentration with high earnings, while areas east of the Anacostia River, primarily in Southeast Washington, have low employment concentration with low earnings.

Zip codes 20005, 20006, 20036, and 20037 in Ward 2 had a combined 7,466 establishments and 142,445 average employment, representing 31.3% of total private sector employment, \$3.5 billion average total wage, and \$1,888 average weekly wage. Zip codes 20019, 20020, 20032, and 20332 in Wards 7 and 8 had a combined 916 number of establishments, 11,468 average employment representing only 2.5% of total private sector employment, \$129.4 million average total wage, and \$868 average weekly wage. Table 3 also shows that zip code 20036 had the most establishments (3,031) and the highest employment (56,383). Zip code 20004 had the highest average weekly wage of \$2,173 – 1.4 times higher than the District's average weekly wage of \$1,569, and zip code 20332 in Ward 8 had the lowest average weekly wage of \$493 – 3.2 times lower than the District's average, and 4.4 times lower than zip code 20004 average.



<b>Table 3: District of Columbia Private Sector Employment by Zip Codes,</b>				
<b>Fourth Quarter 2008</b>				
<b>Zip Code</b>	<b>Number of Establishments</b>	<b>Average Employment</b>	<b>Total Average Wage</b>	<b>Average Weekly Wage</b>
Total Private Sector	34,067	455,108	\$8,708,521,001	\$1,472
20001	1,441	31,488	\$502,637,361	\$1,228
20002	1,490	22,226	\$321,930,410	\$1,114
20003	1,195	15,400	\$234,201,013	\$1,170
20004	979	27,311	\$771,415,480	\$2,173
20005	2,431	47,859	\$1,177,688,158	\$1,893
20006	2,004	38,203	\$990,822,524	\$1,995
20007	2,196	22,852	\$406,932,406	\$1,370
20008	1,651	10,252	\$130,959,897	\$983
20009	1,730	18,208	\$233,143,471	\$985
20010	561	16,525	\$262,189,453	\$1,220
20011	761	8,400	\$84,403,101	\$773
20012	372	3,987	\$39,201,510	\$756
20015	1,103	4,960	\$74,729,609	\$1,159
20016	2,125	20,835	\$361,381,551	\$1,334
20017	293	6,965	\$90,135,997	\$995
20018	347	6,583	\$73,971,711	\$864
20019	284	3,138	\$32,588,061	\$799
20020	375	3,392	\$34,850,236	\$790
20024	596	16,223	\$274,575,623	\$1,302
20032	248	4,875	\$61,564,473	\$971
20036	3,031	56,383	\$1,326,974,259	\$1,810
20037	907	19,671	\$388,235,964	\$1,518
20052	12	6,975	\$98,459,265	\$1,086
20057	9	6,343	\$102,084,289	\$1,238
20059	8	4,971	\$50,099,864	\$775
20064	6	2,534	\$19,258,188	\$585
20332	9	63	\$403,977	\$493
Not-Classifiable*	7,903	28,486	\$563,683,150	\$1,522
Total, All Sectors	34,377	689,028	\$14,056,582,717	\$1,569
Note: *Includes establishments with missing zip codes.				
Source: Department of Employment Services, Office of Labor Market Research & Information				

Figure 3: DC Private Sector Covered Employment by Zip Codes, 2008Q4



**Notes:**

1. Employment of establishments with unique zip codes is included in the standard zip codes.
2. The establishment data is derived from Quarterly Census of Employment and Wages (QCEW) program. QCEW is comprised of employment and wages from unemployment insurance (UI) tax reports.

Source: DC Department of Employment Services, Office of Labor Market Research & Information

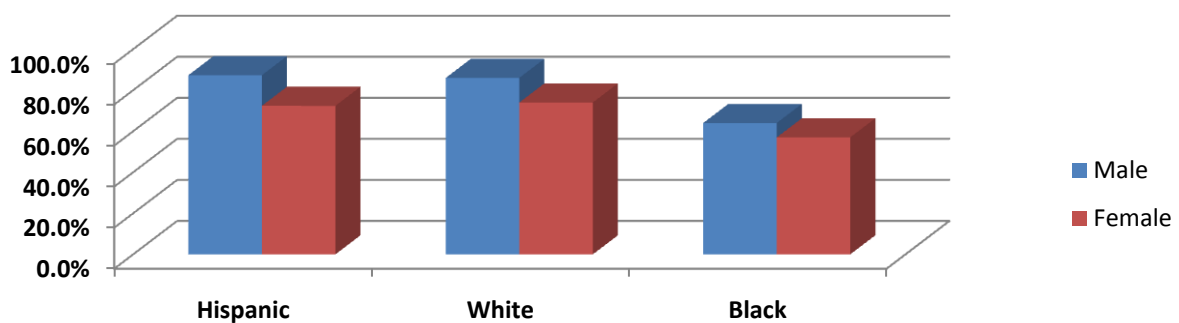
## II. LABOR MARKET ANALYSIS, 2008

While the nation suffered massive job losses during the recession, the District's supply of jobs experienced modest growth. However, this resiliency was not reflected in the labor force. The District's unemployment rate continued to be above the national unemployment rate, and unemployment insurance claims closely followed the national trend as the layoffs increased. For these reasons, the labor market appeared to be a better gauge of the recession's impact on the District.

### **Labor Force Participation Rates**

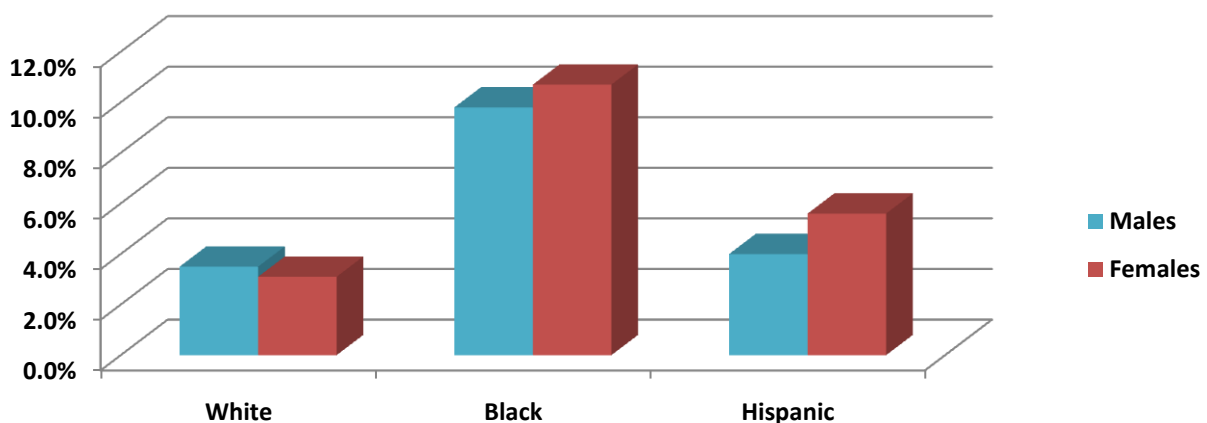
Labor force participation rates (LFPRs) measure the number of citizens -16 years and over – who are employed or looking for employment as a percentage of the civilian population. As indicated in Figures 4 and 5 and Table 4, males (74.7%) have higher participation rates than females (64.5%). Hispanic males had the highest participation rates (87%); Blacks have the lowest participation rates (59.8%) and the highest unemployment rate (10.3%). Black females had the lowest participation rates (57%) and the highest unemployment rate (10.7%). Whites accounted for the highest proportion of persons in the labor force (48%), followed by Blacks (44%) and Hispanics (8%). White males and Black females accounted for the largest percentage of persons in the labor force at 27% and 24%, respectively.

**Figure 4: District of Columbia LFPR by Race/Gender, 2008**



Source: U.S. Census Bureau, American Community Survey, 2008

**Figure 5: District of Columbia Unemployment Rates by Race/Gender, 2008**

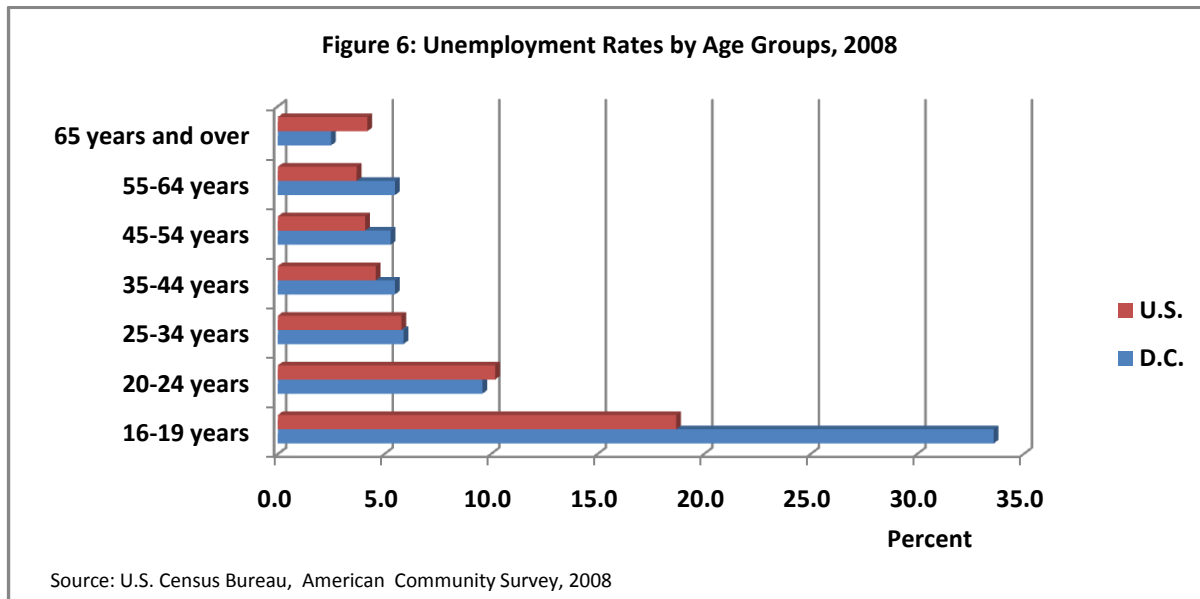


Source: U.S. Census Bureau, American Community Survey, 2008

**Table 4: Employment Status of the Civilian Non-Institutional Population By Sex, Age,**

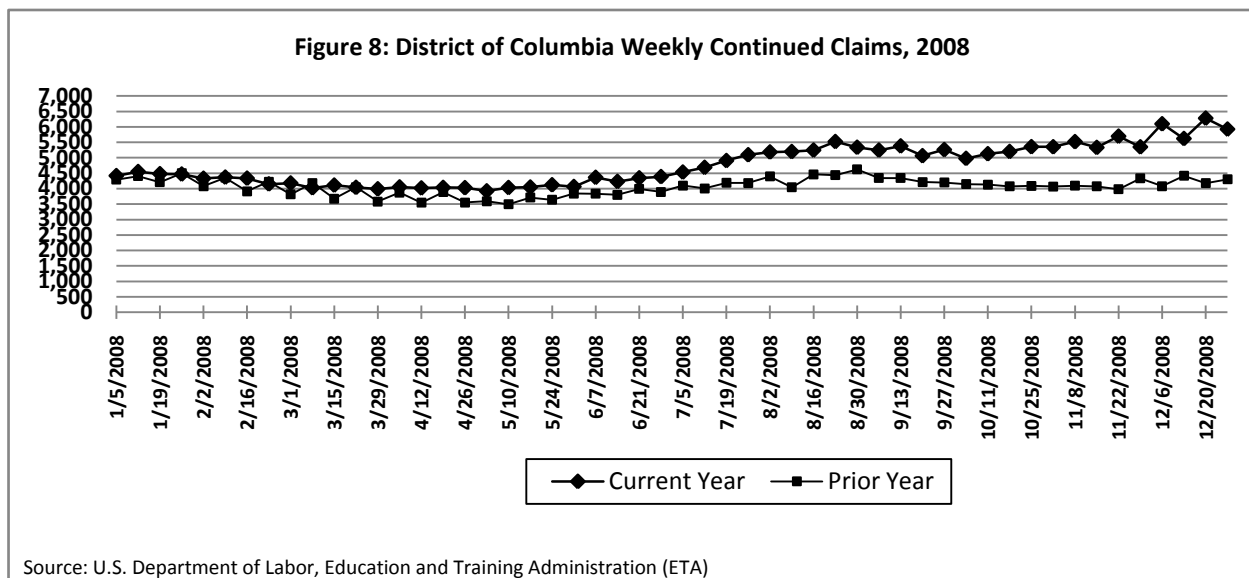
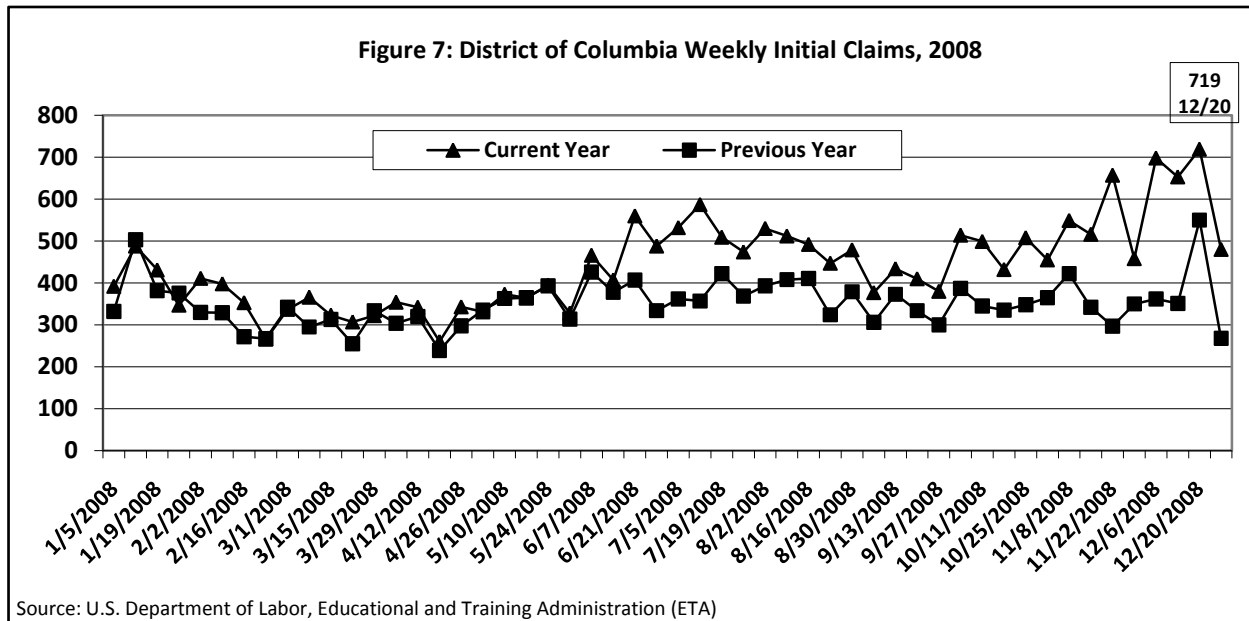
Race, 2008 Annual Averages (in 000's)*						
Civilian Participation					Unemployment	
Race & Sex	Population	Rate	Number	Employment	Number	Rate
Total Pop 16+	480.0	69.2	332.0	310.0	22.0	6.6
Men	221.0	74.7	165.0	155.0	10.0	6.2
Women	259.0	64.5	167.0	155.0	12.0	7.0
White	206.0	80.0	165.0	159.0	5.0	3.3
Men	103.0	85.8	88.0	85.0	3.0	3.5
Women	103.0	74.1	76.0	74.0	2.0	3.1
Black	251.0	59.8	150.0	135.0	15.0	10.3
Men	108.0	63.5	69.0	62.0	7.0	9.8
Women	143.0	57.0	81.0	73.0	9.0	10.7
Hispanic	40.0	80.6	32.0	31.0	2.0	4.7
Men	22.0	87.3	19.0	18.0	1.0	4.0
Women	18.0	72.4	13.0	13.0	1.0	5.6
*Data may not add up to totals due to independent rounding						
Source: Bureau of Labor Statistics, Current Population Survey						

To understand the impact of the recession on the District, it is important to study the profile of the unemployed during the recession. In 2008, overall unemployment rates for the District were higher than the national averages in all age categories except the 20–24 year old group and those 65 years and older. Adolescents 16–19 years old had the highest unemployment rate at 33.6% - considerably higher than the U.S. rate of 18.7% for this age group. The District's population of 65+ year olds had unemployment rates of 2.5% compared to the U.S. rate of 4.2%.



### **District of Columbia Unemployment Insurance (UI) Claims Analysis**

Figures 7 and 8 show the number of newly laid-off workers filing UI claims for unemployment insurance benefits in 2008 compared to claims filed the same week in 2007. Economists closely watch UI claims data, which reflect the country's fiscal health as indicated by job losses and companies' willingness to hire new workers. UI initial claims measure emerging unemployment, and continued claims measure the number of persons claiming unemployment benefits. From December 2007 to December 2008, first time initial claimants in the District increased by 84% from 1,234 to 2,281 and continued claims rose by 41% from 16,980 to 23,926, as compared to 26% and 33%, respectively, for the nation. The highest number of UI claims were recorded in the week ending December 20, 2008, with 719 initial claims and 6,281 continued claims.



## Unemployment by Area and Industry

Tables 5 through 7 show claims filed in the fourth quarter of 2007, when the recession started, through the fourth quarter of 2008. First time unemployment insurance claims increased by 51% - from 4,722 to 7,138. Total initial claims data during the recession reflect the industry composition of the District: almost 90% of all claims were filed against service-producing industries, and less than 6% were filed against goods-producing industries. The claims data also show the burdens of unemployment were spread across all industry sectors. Initial claims filed against establishments in professional and business services increased by 68%, from 1,703 to 2,859; claims filed in leisure and hospitality increased by 27% from 925 to 1,171; claims in educational and health services increased by 55% from 636 to 987; claims in other services increased by 89% from 279 to 526; claims in trade, transportation, and utilities increased by 61% from 241 to 388; claims in financial services increased 37% from 247 to 338; and the number of first time initial claims in information rose 96% from 136 to 267. A total of 23,053 initial claims were filed in 2008, compared to 18,266 initial claims filed in 2007. The vast majority - 74% of claims in 2007 and 77% of claims in 2008 - were filed against four major industry sectors - professional and business services, educational and health services, leisure and hospitality, and other.

**Table 5: District of Columbia – Initial Claims Associated with potential Layoff Events by Resident State\***

						% Change
State of Residency	2007Q4	2008Q1	2008Q2	2008Q3	2008Q4	07Q4- 08Q4
District of Columbia	2,262	2191	2,598	3130	3,380	49%
Maryland	1,835	1795	1,798	2247	2,587	41%
Virginia	495	586	459	589	907	83%
All Other	130	169	156	197	264	103%
<b>Total</b>	<b>4,722</b>	<b>4,741</b>	<b>5,011</b>	<b>6,163</b>	<b>7,138</b>	<b>51%</b>

**Table 6: District of Columbia – Initial Claims Associated with potential Layoff Events by Major Industry Sectors\***

					% Change	
Industry	2007Q4	2008Q4	2007	2008	07Q4 to 08Q4	2007- 2008
Construction	273	322	922	1,099	17.9%	19.2%
Manufacturing	15	27	48	74	80.0%	54.2%
Wholesale Trade	25	52	121	182	108.0%	50.4%
Retail Trade	168	276	678	919	64.3%	35.5%
Transportation & Warehousing	40	56	268	208	40.0%	-22.4%
Utilities	**	**	**	**	**	**
Information	136	267	492	688	96.3%	39.8%
Finance & Insurance	139	172	425	597	23.7%	40.5%
Real Estate & Rental Leasing	108	166	448	571	53.7%	27.5%
Professional & Technical Services	1,223	1,927	4,754	6,318	57.6%	32.9%
Mgt. of Companies & Enterprises	**	**	**	**	**	**
Administrative & Waste Services	479	929	2,016	3,043	93.9%	50.9%
Educational Services	135	395	733	1,458	192.6%	98.9%
Health Care & Social Assistance	501	592	1,882	2,159	18.2%	14.7%
Arts, Entertainment & Recreation	40	62	187	218	55.0%	16.6%
Accommodation & Food services	885	1,109	2,579	3,016	25.3%	16.9%
Other Services, exc. Public Admin.	279	526	1,256	1,509	88.5%	20.1%
Public Administration	26	23	271	105	-11.5%	-61.3%
Unclassified Establishments	18	46	97	137	155.6%	41.2%
Invalid NAICS	223	184	1,034	717	-17.5%	-30.7%
<b>Total</b>	<b>4,722</b>	<b>7,138</b>	<b>18,266</b>	<b>23,053</b>	<b>51.2%</b>	<b>26.2%</b>

**Table 7: District of Columbia – Initial Claims Associated with potential Layoff Events\***

Percent of Total by Major Industry Sectors				
Industry	2007Q4	2008Q4	2007	2008
Construction	5.8%	4.5%	5.0%	4.8%
Manufacturing	0.3%	0.4%	0.3%	0.3%
Wholesale Trade	0.5%	0.7%	0.7%	0.8%
Retail Trade	3.6%	3.9%	3.7%	4.0%
Transportation & Warehousing	0.8%	0.8%	1.5%	0.9%
Utilities	**	**	**	**
Information	2.9%	3.7%	2.7%	3.0%
Finance & Insurance	2.9%	2.4%	2.3%	2.6%
Real Estate & Rental Leasing	2.3%	2.3%	2.5%	2.5%
Professional & Technical Services	25.9%	27.0%	26.0%	27.4%
Mgt. of Companies & Enterprises	**	**	**	**
Administrative & Waste Services	10.1%	13.0%	11.0%	13.2%
Educational Services	2.9%	5.5%	4.0%	6.3%
Health Care & Social Assistance	10.6%	8.3%	10.3%	9.4%
Arts, Entertainment & Recreation	0.8%	0.9%	1.0%	0.9%
Accommodation & Food services	18.7%	15.5%	14.1%	13.1%
Other Services, exc. Public Admin.	5.9%	7.4%	6.9%	6.5%
Public Administration	0.6%	0.3%	1.5%	0.5%
Unclassified Establishments	0.4%	0.6%	0.5%	0.6%
Invalid NAICS	4.7%	2.6%	5.7%	3.1%
<b>Total</b>	100.0%	100.0%	100.0%	100.0%

Note\*: Potential Layoff Events are events in which 10 or more unemployment insurance claims have been filed against an establishment during a 5-week period. Potential events have yet to be confirmed by an employer.

Source: DC Department of Employment Services, Office of Labor Market Research & Information

### **Resident Labor Force, Employment and Unemployment**

In 2008, the number of employed District residents increased by 2%, from 303,482 to 309,528. At the same time, the number of unemployed residents increased by 21%, from 19,149 to 23,175. As a result, the resident civilian labor force rose by 3.1% from 322,631 to 332,703, while the unemployment rate increased by 1.1% to 7.0% (See Table 8). Since 2000, the District's labor force has grown by 23,141 persons with the number of employed residents increasing by 15,133 (6%) and the number of unemployed residents increasing by 1,008 (32.4%), resulting in the unemployment rate increasing by 1.3%.

Table 8: Employment Status of the District of Columbia Civilian Population							
(Not Seasonally Adjusted)							
				Change From		% Change From	
	2008	2007	2000	2007	2000	2007	2000
Civilian Labor Force	332,703	322,631	309,421	10,072	23,282	3.1%	7.5%
Total Employed	309,528	303,482	291,916	6,046	17,612	2.0%	6.0%
Total Unemployed	23,175	19,149	17,505	4,026	5,670	21.0%	32.4%
Unemployment Rate	7.0	5.9	5.7	1.1	1.3		

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics (LAUS)

District unemployment rates by District of Columbia Ward<sup>4</sup> ranged from a low of 1.8% in Ward 3 in upper Northwest to a high of 18.2% in Ward 8. (See Figure 9). Unemployment rates for Wards 5, 7, and 8 were above the annual average unemployment of 7.0% for the District. The rates for Wards 1, 2, 3, and 4 were below the District's average with Ward 3 and Ward 2 having rates substantially below the U.S rate.

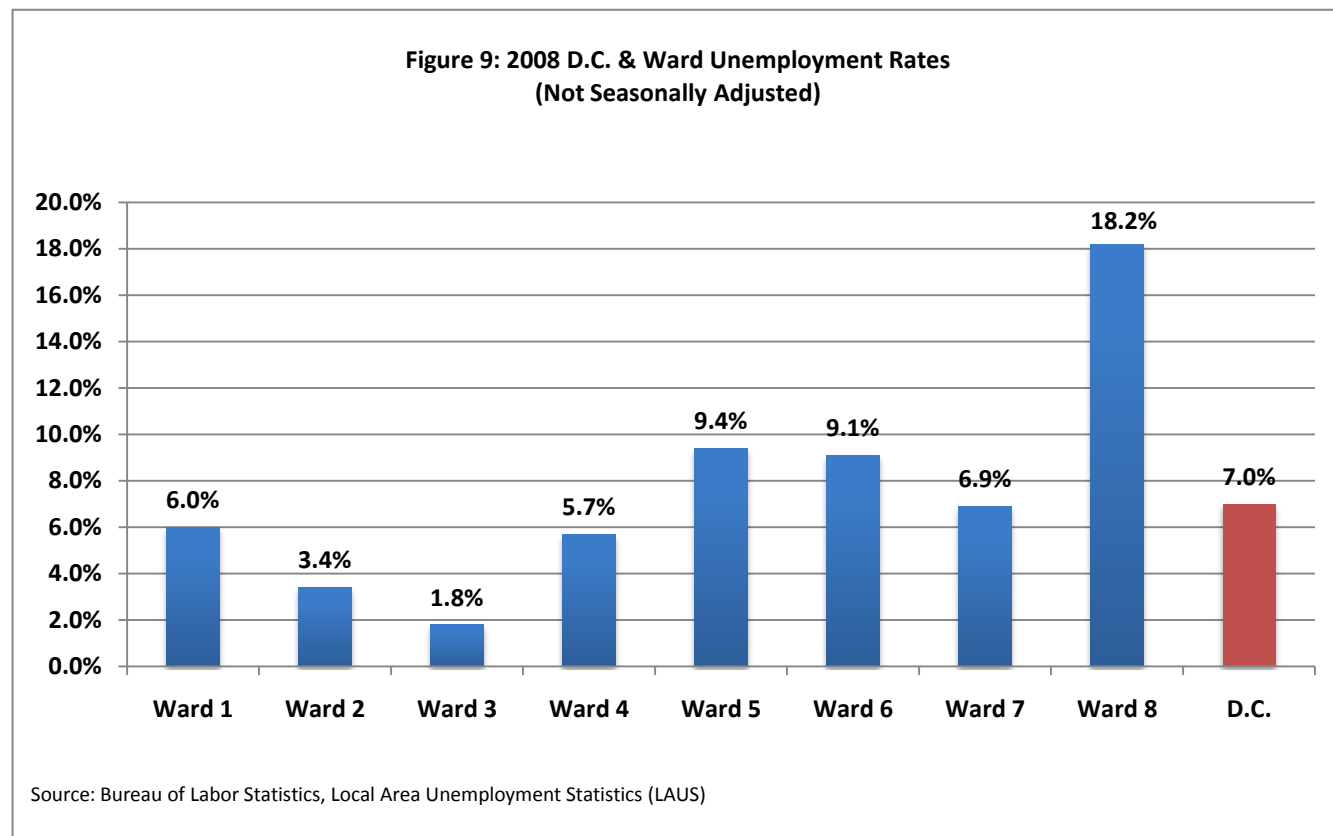
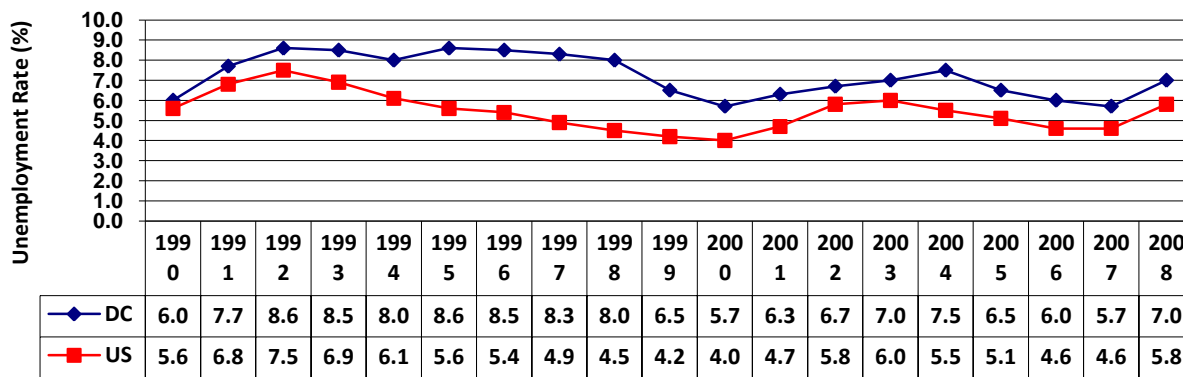


Figure 10 offers a comparison of the District's historical unemployment rates with the national rates for the period 1990-2008. With the exception of 1995 and 2004, the District's rate followed the national trend, rising to its highest level at 8.6% in 1992, and dropping to its lowest level at 5.7% in 2000. After 2000, the District's unemployment rate rose, reaching 7.5% in 2004 before declining to 5.7% in 2007. During the early and mid 90s, the gap between the national and District rates widened as the city was undergoing a fiscal crisis and employed residents were moving to the suburbs. Following the 2001 recession, the gap in the rates had narrowed to 1% by 2003. The same trend is noticeable in 2008, as the national economy starts to experience economic downturn.

<sup>4</sup> Developed by D.C. Department of Employment Services, Office of Labor Market Research and Information using household labor force data from 2000 Census.



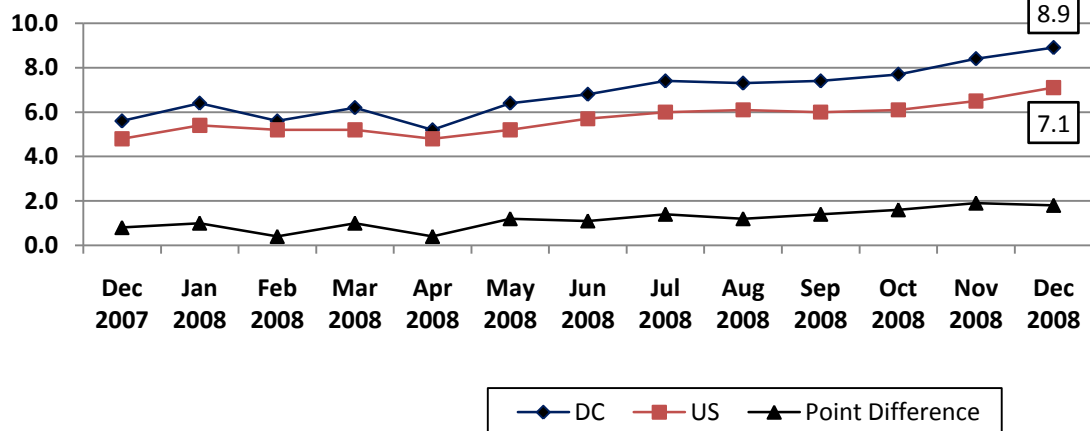
Figure 10: Average Annual Unemployment for District of Columbia and U.S.



Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics (LAUS)

From December 2007 to December 2008, the national seasonally unadjusted jobless rate rose by 47.9% from 4.8% to 7.1%, while the District's seasonally unadjusted unemployment rose by 58.9% from 5.6% to 8.9% (See Figure 11). The point differential between the national and the District rates suggests a significant structural element in the District's workforce during economic downturns as unemployed residents struggle to reenter the job market after being laid off. From December 2007 to April 2008, the point differential between the national and the District unemployment rates averaged 0.7; the point differential averaged 1.5 in the later part of 2008 as the recession took hold.

Figure 11: D.C. and U.S. Unemployment Rates, December 2007 - December 2008  
(not seasonally adjusted)

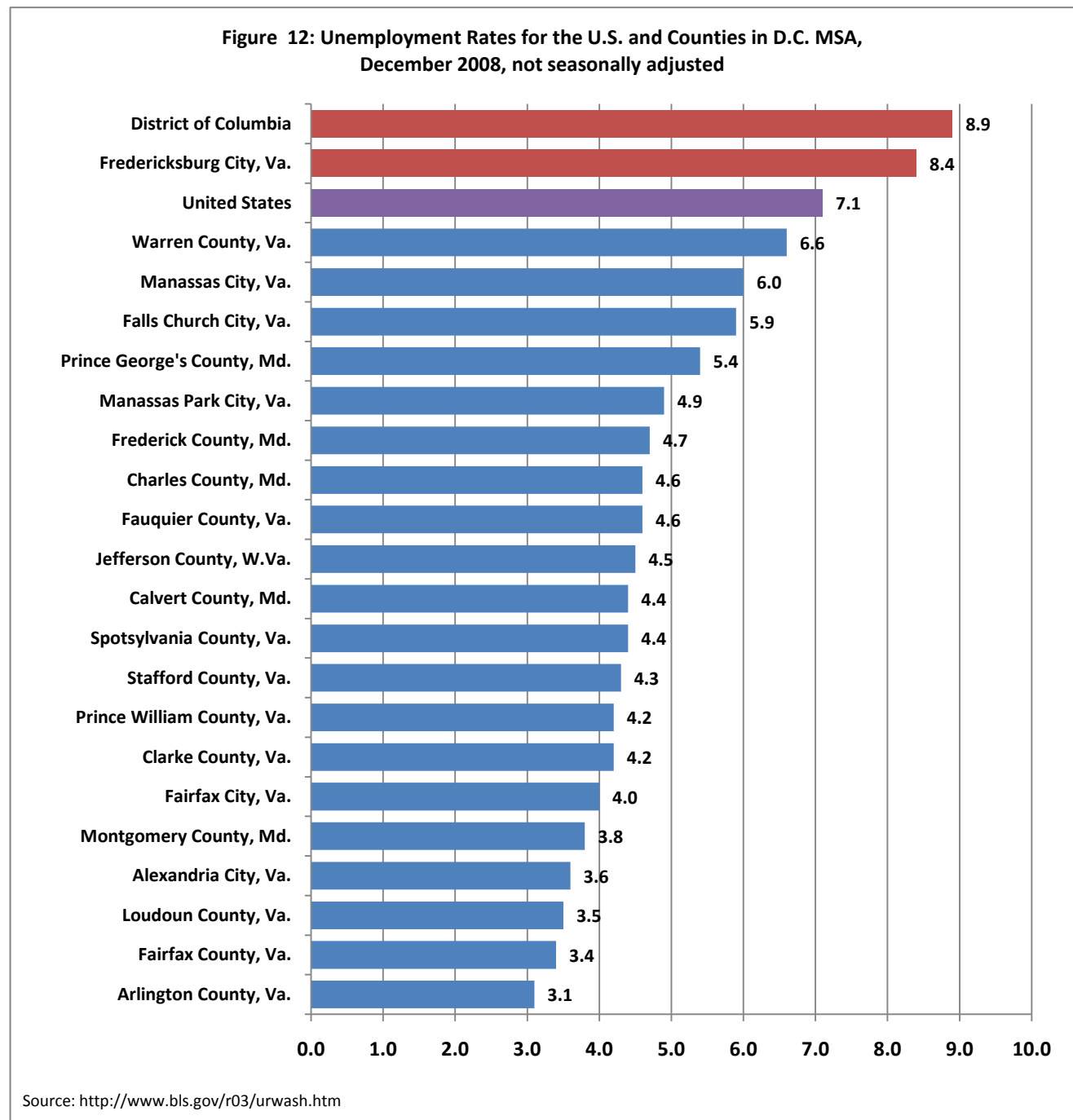


Source: U.S. Bureau of Labor Statistics

### Unemployment in the Washington Area – December 2008

In December 2008, the D.C.-Va.-Md.-W.Va., Metropolitan Statistical Area (MSA) recorded an unemployment rate of 4.7%; Washington-Arlington-Alexandria, D.C.-Va.-Md.-W.Va. Metro Division had an unemployment rate of 4.9%, while Bethesda-Frederick-Rockville, Md. Metro Division had an unemployment rate of 4.0%. Arlington County, Va. recorded the lowest unemployment rate in the Washington-Arlington-Alexandria, D.C.-Va.-Md.-W.Va., MSA at 3.1%. Fairfax County, Va., had the second lowest rate at 3.4%, followed by Loudon County, Va., at 3.5%. The District (8.9%) and Fredricksburg City, Va., (8.4%) had the highest unemployment among the 22

counties that make up the metropolitan area and well above the national rate of 7.1%. The remaining 20 counties registered jobless rates that were well below the national rate. (See Figure 12).



### III. LABOR FORCE STATISTICS

**Resident Population by Age and Sex.** The District's population has grown by approximately 3.5% since 2000 to an estimated 591,833 (Table 9). This represented an increase of more than 19,000 residents, with increases of 10,514 males and 9,260 females. During the same time period, the population under 18 years old grew by 8.24%, while the population over 18 years old increased by 2.4%. In 2008, women were the majority in the District representing 52.7% of the total population and males were 47.3%, compared to 50.7% and 49.3%,

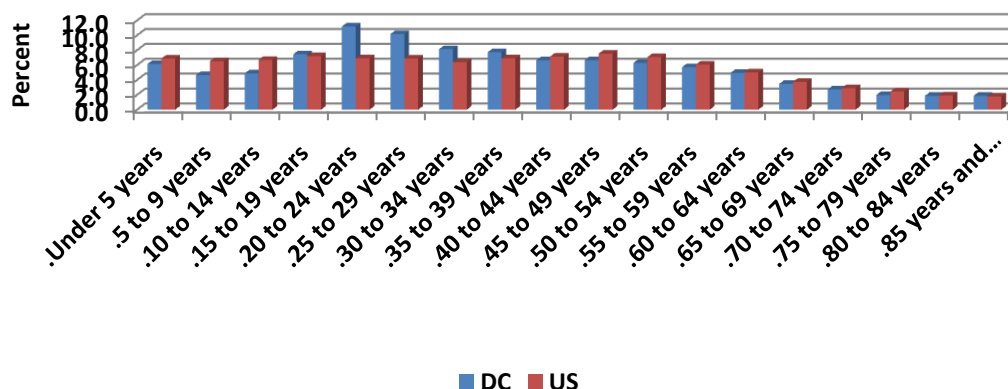
respectively, nationally. The median age of the population in the District was 38.1 in 2008, up 0.2 years from 2007 and up 1.6 years from 2000.

Table 9: District of Columbia Population by Age and Sex							
Sex and Age	Population Estimates		Census	Change From		% Change	
	July 1, 2008	July 1, 2007	April 1, 2000	2007	2000	2007	2000
<b>Both Sexes</b>	591,833	588,292	572,059	3,541	19,774	0.60	3.46
Under 18 years	112,016	113,073	103,484	-1,057	8,532	-0.93	8.24
18 years and over	479,817	475,219	468,575	4,598	11,242	0.97	2.40
Median age (years)	34.9	35.0	34.6	0	0	-0.29	0.81
<b>Male</b>	279,880	277,828	269,366	2,052	10,514	0.74	3.90
Under 18 years	57,078	57,613	52,171	-535	4,907	-0.93	9.41
18 years and over	222,802	220,215	217,195	2,587	5,607	1.17	2.58
Median age (years)	33.9	34.1	33.7	0	0	-0.59	0.53
<b>Female</b>	311,953	310,040	302,693	1,913	9,260	0.62	3.06
Under 18 years	54,938	55,460	51,313	-522	3,625	-0.94	7.06
18 years and over	257,015	254,580	251,380	2,435	5,635	0.96	2.24
Median age (years)	35.8	36.0	35.6	0	0	-0.56	0.68
Source: Population Division, U.S. Census Bureau, Annual Estimates of the Population by Age and Sex for the District of Columbia							

Census estimates for the District (Figure 13) indicate the District has a larger proportion of young adults than the nation. This is particularly evident in the 20–34 age group, which accounts for 29.5% of the city’s population, compared to 20.2% nationally. The District’s population of workers in the 50–64 age group is 17.0%, compared to 18.2% nationally. The quotient of young adult workers has significant socioeconomic implications for the District’s workforce. Employability for the population is positively influenced by more frequent and skilled use of communication technologies, such as Internet email, texting, and Instant Messaging; computer software applications, such as accounting programs, office suites, graphics software, and media players; sophisticated cell phones, such as “Smart Phones” and “Android” devices, including “Blackberries” and “I-Phones;” and even familiarity with social networking web sites like Facebook and Twitter<sup>5</sup>.

<sup>5</sup> [http://en.wikipedia.org/wiki/Generation\\_Y](http://en.wikipedia.org/wiki/Generation_Y).

Figure 13: 2008 Population Distribution by Age



Source: U.S. Census Bureau

### Resident Population by Race

As displayed in Table 10 and Figure 14, African Americans were the largest racial group with 312,590 persons (52.8%), followed by Whites with 194,261 persons (32.8%), then Hispanics or Latinos with 51,124 persons (8.6%), then Asians with 19,690 persons (3.3%), and all other races with 14,228 persons (2.4%).

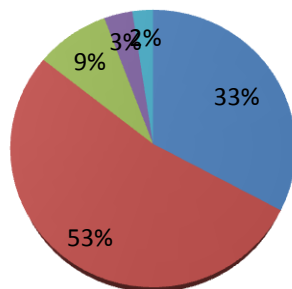
Table 10: District of Columbia Population by Race, 2000-2008

Race*	Population**			Change		% Change	
	2008	2007	2000	2007-2008	2000-2008	2007-2008	2000-2008
Total All Races	591,833	588,292	572,059	3,541	19,774	0.60	3.46
White	194,261	191,463	161,260	2,798	33,001	1.46	20.46
Black or African American	312,590	318,468	342,464	-5,878	-29,874	-1.85	-8.72
Hispanic or Latino	51,124	49,016	44,953	2,108	6,171	4.30	13.73
Asian	19,690	19,388	15,402	302	4,288	1.56	27.84
Other Races	14,228	9,957	7,980	4,271	6,248	42.89	78.30
*Other Races include American Indian and Alaska Native, Native Hawaiian and Pacific Islander, and two or more races							
**The 2000 population is census data and the 2001-2006 are population estimates.							
Source: U.S. Census Bureau, American Community Survey							

Over the past several years, as the District's overall population increased, the racial makeup has also become more diversified. The proportion of African Americans has steadily declined, while all other races increased. From 2000 to 2008, the total population increased by 3.5% (19,774 persons), while the African American population decreased by 8.7% (-29,894 persons); Asian population increased by 27.8% (3,989 persons); White population increased by 20.5% (30,203 persons); Latino population increased by 7% (4,063 persons), and all other races increased by 78.3% (6,248 persons).

**Figure 14: District of Columbia Percent Population by Race, 2008**

■ White ■ Black or African American ■ Hispanic or Latino ■ Asian ■ Other Races



Source: U.S. Census Bureau

### **Income**

In 2008 the District had a per capita personal income (PCPI) of \$46,069, which was \$18,480 higher than the national average of \$27,589 (Table 12). The 2008 PCPI for the District reflected an increase of 14.1% from 2007 while the national PCPI increased by 3.4%. In 2008, the median household income was \$57,936 (\$52,029 for U.S.), and the median family income was \$66,722 (\$63,366 for U.S.) About 14% of families and 17% of the District population were below the poverty line, compared to 9.7% and 13.2% of the U.S. total population, respectively.

**Table 11: 2008 Income and % of Population Below Poverty Level\***

	Median Household Income	Median Family Income	Per Capita Personal Income	Families Below Poverty Level	Individuals Below Poverty Level
Area					
District of Columbia	\$57,936	\$66,722	\$46,069	13.70%	17.20%
U.S. National	\$52,029	\$63,366	\$27,589	9.70%	13.20%

\*In 2008 Inflation Adjusted Dollars

Source: U.S. Census Bureau, 2008 American Community Survey

### **Education**

The District has a more highly educated population than the nation as a whole. As shown in Table 12, in 2008, 47.5% of the population 25 years and over in the District were college graduates, compared to 29.5% for the nation, and the percentage of high school graduates in the District was 85.8% compared to 85% for the nation. From 2000 to 2008, the percentage of college graduates in the District rose by a significant 8.1% while increasing by only 0.1% in the nation. The percentage of high school graduates in the District increased by 8% while increasing 4.6% across the nation.

**Table 12: Educational Attainment of the Population 25 Years and Over**

	% High School Graduates			% College Graduates		
Area	2008	2007	2000	2008	2007	2000
District of Columbia	85.80%	85.70%	77.80%	48.20%	47.50%	39.10%
U.S.	85.00%	84.50%	80.40%	29.50%	24.50%	24.40%

Source: U.S. Census Bureau, American Community Survey

#### IV. TOP 20 PRIVATE SECTOR EMPLOYERS IN THE DISTRICT OF COLUMBIA

In September 2008, 12 of the top 20 employers in the District listed in Table 13 were either universities or hospitals. These included Georgetown University, Washington Hospital Center, George Washington University, Children's National Hospital, and Howard University, which are ranked as the top five private sector employers in the District.

<b>Table 13: Top 20 Private Sector Employers in the District of Columbia, 2008*</b>
<b>Employer Name</b>
Georgetown University
Washington Hospital Center
George Washington University
Children's National Hospital
Howard University
Federal National Mortgage Association (Fannie Mae)
Georgetown University Hospital
American University
Providence Hospital
The Catholic University of America
Howard University Hospital
The Washington Post Newspaper
Sibley Memorial Hospital
The George Washington Hospital
Admiral Security Services
American National Red Cross
Corporate Executive Board (Advisory Board)
Marriott Hotel Services, Inc.
Safeway, Inc.
Hyatt Corporation
*Ranking by size of workforce.
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW)

## V. DISTRICT OF COLUMBIA BUSINESS EMPLOYMENT DYNAMICS, 2008

Business Employment Dynamics (BED) is a virtual census of private sector firms. It includes all establishments covered by state UI programs and is compiled in the Quarterly Census of Employment and Wages (QCEW), also known as the ES-202 program. Each quarter these firms include gross job gains – the sum of increases in employment from existing businesses and the addition of new jobs at opening businesses, and gross job losses – the sum of decreases in employment from contractions at existing businesses and the loss of jobs at closing businesses. Employment changes in the BED are measured from the third month of one quarter to the third month of the next quarter. The net job change is the difference between gross job gains and gross job losses.

The seasonally adjusted gross job gains and gross job losses in the District in 2006, 2007, and 2008 are presented in Table 14. The data show that from 2000 to 2008, the District experienced a net job loss of 23,571 jobs: a net result of (-27,536) gross job gains and 3,965 gross job losses. In 2008, the District experienced a net job loss of 562 jobs: a net result of 109,476 gross job gains (89,222 from expanding establishments and 20,254 from opening establishments) and 110,038 gross job losses (89,681 contracting establishments and 20,357 closing establishments). Compared to a year earlier in 2007, the District gained a total of 4,262 net jobs: 109,166 gross job gains (89,204 from expanding establishments and 19,962 from opening establishments) and 104,904 gross job losses (83,050 contracting establishments and 21,854 closing establishments).

Table 14: District of Columbia Private Sector Gross Job Gains and Job Losses*								
Year	Quarter	Net Change**	Total	Gross Job Gains		Total	Gross Job Losses	
				Expanding	Openings		Contracting	Closing
2000	March	5,420	33,716	25,985	7,731	28,296	24,159	4,137
	June	7,309	33,827	26,844	6,983	26,518	20,138	6,380
	September	2,641	34,273	25,753	8,520	31,632	21,559	10,073
	December	7,639	35,196	29,015	6,181	27,557	20,199	7,358
2007	March	5,210	28,423	23,344	5,079	23,213	18,657	4,556
	June	1,115	27,543	22,463	5,080	26,428	21,089	5,339
	September	-2,575	26,296	22,496	3,800	28,871	22,182	6,689
	December	512	26,904	20,901	6,003	26,392	21,122	5,270
2008	March	2560	27927	23010	4917	25367	20576	4791
	June	1435	28294	23346	4948	26859	22383	4476
	September	1584	28071	22984	5087	26487	21764	4723
	December	-6141	25184	19882	5302	31325	24958	6367
2009	March	-2,145	25858	21425	4433	28003	22983	5020
*Seasonally adjusted								
**Net change is the difference between total gross job gains and total gross job losses.								
Source: U.S. Bureau of Labor Statistics, Business Employment Dynamics								

## VI. OCCUPATIONAL EMPLOYMENT STATISTICS (OES), 2008

Table 15 shows occupational employment by major occupational groups in 2008. In the District, office and administrative support (16%), business and financial operations (12.4%), and management occupations (11.2%) were the top three major occupational groups, accounting for 39.6% of total employment in 2008, compared to 26.3% in the nation. The single occupational group with the largest number of employees in the District and in the nation was office and administrative support, which accounted for 101,840 jobs in the District and 17.2% of total employment in the nation. Sales and related occupations had the second largest number of jobs nationally, accounting for 10.6% of total employment. The percentage of sales jobs in the District was 4.3%, less than half the national average.

**Table 15: Occupational Employment by Major Occupational Groups, 2008**

Occupation (SOC Code)	D.C. Employment	% of Total Employment	
		D.C.	U.S.
Total, All Occupations (000000)	635,500	100.0	100.0
Management Occupations (110000)	71,190	11.2	4.6
Business and Financial Operations Occupations (130000)	78,850	12.4	4.5
Computer and Mathematical Occupations (150000)	34,200	5.4	2.4
Architecture and Engineering Occupations (170000)	12,290	1.9	1.9
Life, physical, and Social Science Occupations (190000)	22,520	3.5	1.0
Community and Social Services Occupations (210000)	11,380	1.8	1.4
Legal Occupations (230000)	37,550	5.9	0.7
Education, Training, and Library Occupations (250000)	34,610	5.4	6.3
Arts, Design, Entertainment, Sports, and Media Occupations (270000)	28,540	4.5	1.3
Healthcare Practitioners and Technical Occupations (290000)	25,950	4.1	5.2
Healthcare Support Occupations (310000)	7,200	1.1	2.8
Protective Service Occupations (330000)	26,110	4.1	2.3
Food Preparation and Serving Related Occupations (350000)	42,810	6.7	8.5
Building and Grounds Cleaning and Maintenance Occupations (370000)	22,070	3.5	3.3
Personal Care and Service Occupations (390000)	10,580	1.7	2.5
Sales and Related Occupations (410000)	27,500	4.3	10.6
Office and Administrative Support Occupations (430000)	101,840	16.0	17.2
Construction and Extraction Occupations (470000)	10,870	1.7	4.8
Installation, Maintenance, and Repair Occupations (490000)	8,960	1.4	4.0
Production Occupations (510000)	7,670	1.2	7.3
Transportation and Material Moving Occupations (530000)	12,740	2.0	7.0

Source: U.S. Bureau of Labor Statistics, Occupational Employment Statistics (OES) Survey, May 2008



Table 16 shows employment and median wage of occupations with the fewest workers that pay a median wage of at least \$20 per hour in the District in May 2008. The smallest occupations combined made up less than four tenths of 1% of total employment in the District. Yet, 19 of the occupations paid more than the District median annual wage of \$55,380.

<b>Table 16: Employment and Median Wage for Low-Number Occupations in the District of Columbia, May 2008</b>			
<b>Occupation</b>	<b>Employment</b>	<b>Median Wage*</b>	
		<b>Hourly</b>	<b>Annual</b>
Epidemiologists	40	\$34.78	\$72,340
Funeral directors	50	\$23.01	\$47,860
Mathematicians	50	\$56.00	\$116,470
Materials scientists	50	\$42.63	\$88,680
Audiologists	60	\$33.06	\$68,770
Veterinarians	60	\$59.50	\$123,760
Wholesale & retail buyers exc. farm products	70	\$23.19	\$48,240
Health & safety engineers exc. mining safety engineers & inspectors	70	\$42.50	\$88,400
Paving surfacing & tamping equipment operators	70	\$22.28	\$46,340
Dental laboratory technicians	70	\$32.75	\$68,130
Purchasing agents & buyers farm products	80	\$30.70	\$63,860
Biomedical engineers	80	\$29.42	\$61,190
Optometrists	80	\$38.73	\$80,570
Cabinetmakers & bench carpenters	80	\$24.69	\$51,360
First-line supervisors/managers of helpers laborers & material movers, hand	80	\$27.79	\$57,810
Emergency management specialists	90	\$31.07	\$64,630
Chemical engineers	90	\$51.55	\$107,220
Mechanical engineering technicians	90	\$28.70	\$59,700
Film & video editors	90	\$29.33	\$61,000
Internists general	90	\$64.36	\$133,880
Fire inspectors & investigators	90	\$34.25	\$71,240
Elevator installers & repairers	90	\$26.36	\$54,820
Locksmiths & safe repairers	90	\$24.01	\$49,950
Excavating & loading machine & dragline operators	90	\$21.81	\$45,370
Environmental engineering technicians	100	\$22.92	\$47,670
Zoologists & wildlife biologists	100	\$55.66	\$115,780
Probation officers & correctional treatment specialists	100	\$24.11	\$50,150
1st-line supervisors/managers of landscaping lawn service & grounds keeping	100	\$26.75	\$55,650
*The Hourly median wage is greater or equal to \$20 per hour or \$41,600			
Source: U.S. Bureau of Labor Statistics, Occupational Employment Statistics (OES) Survey, May 2008			

Table 17 shows the occupations with the most workers in the District. Lawyers and general operations managers made up 8.5% of employment in May 2008, and 39% of employment was found in the 31 occupations listed. Many of the most populated occupations are found in a wide variety of industries as the list contains a mix of high wage/high skill and low wage/low skill occupations, while 16 of these occupations paid below the District median annual wage of \$55,380. The data also show that legal, management, and economist occupations had the four highest paying occupations and paid well above the District annual median wage: lawyers paying an annual median wage of \$143,560, followed by general and operations managers at \$117,580, financial managers at \$115,600, and economists at \$107,360.

Table 17: Employment and Median Wage for High-Number Occupations in the District of Columbia, May 2008			
Occupation	Employment	Median Wage	
		Hourly	Annual
Lawyers	28,960	\$69.02	\$143,560
General and operations managers	24,840	\$56.53	\$117,580
Management analysts	15,240	\$39.26	\$81,660
Janitors and cleaners, except maids and housekeeping cleaners	14,490	\$11.76	\$24,450
Office clerks, general	13,570	\$15.92	\$33,120
Executive secretaries and administrative assistants	12,990	\$22.44	\$46,680
Security guards	12,230	\$16.22	\$33,740
Secretaries, except legal, medical, and executive	12,190	\$21.25	\$44,190
Accountants and auditors	11,480	\$33.79	\$70,270
Public relations specialists	10,800	\$40.29	\$83,810
Waiters and waitresses	9,550	\$9.52	\$19,800
Registered nurses	9,240	\$35.06	\$72,930
Receptionists and information clerks	6,960	\$14.84	\$30,860
Retail salespersons	6,910	\$11.17	\$23,230
Legal secretaries	6,770	\$29.63	\$61,620
Cashiers	6,350	\$10.34	\$21,510
Paralegals and legal assistants	6,210	\$28.50	\$59,290
Customer service representatives	6,080	\$16.14	\$33,570
All other information and record clerks	6,040	\$21.12	\$43,930
Financial managers	5,750	\$55.58	\$115,600
Combined food preparation and serving workers, including fast food	5,630	\$9.94	\$20,670
Police and sheriff's patrol officers	5,430	\$30.14	\$62,690
Bookkeeping, accounting, and auditing clerks	4,710	\$20.59	\$42,830
Maids and housekeeping cleaners	4,650	\$14.00	\$29,120
First-line supervisors/managers of office and administrative support workers	4,550	\$30.39	\$63,220
Network and computer systems administrators	4,520	\$34.57	\$71,900
Administrative services managers	4,240	\$36.82	\$76,580
Maintenance and repair workers, general	4,230	\$19.46	\$40,480
Market research analysts	4,170	\$32.01	\$66,590
Economists	4,090	\$51.62	\$107,360
Cooks, restaurant	4,090	\$14.29	\$29,730
Source: U.S. Bureau of Labor Statistics, Occupational Employment Statistics (OES) Survey, May 2008			

### **District of Columbia Occupations Concentrated in a Single Industry**

Many occupations in the District are concentrated in a single industry – 172 occupations had a majority of their employment in one industry, and 56 of these occupations had at least 90% of their employment in one industry (See Table 18). Almost all tax preparers were employed in accounting, tax preparation, bookkeeping, and payroll services, and 88% of environmental science and protection technicians were employed by management, scientific and technical consulting services. Fifty percent of health technologists and technicians were employed in outpatient care centers. Some of the occupations not shown in Table 18 include post-secondary education teachers who are specific to colleges, universities, and professional schools, and postal clerks, who all worked for the government.

**Table 18 : Occupations with employment concentrated primarily in a single industry, 2008**

<b>Occupation</b>	<b>%</b>	<b>Industry</b>
Tax Preparers	<b>100</b>	Acc., Tax Prep., Bookkeeping, & Payroll Services
Dental Hygienists	<b>96</b>	Offices of Dentists
Agricultural & Food Science Technicians	<b>95</b>	Scientific Research & Development Services
Environmental Sc. & Protection Tech., Incl. Health	<b>88</b>	Mgt, Scientific, & Technical Consulting Services
Legal Secretaries	<b>85</b>	Legal Services
Architects, Surveyors, & Cartographers	<b>84</b>	Architectural, Engineering, & Related Services
Photographic Processing Machine Operators	<b>82</b>	Business Support Services
Travel Agents	<b>80</b>	Travel Arrangement & Reservation Services
Tellers	<b>79</b>	Depository Credit Intermediation
Loan Interviewers & Clerks	<b>72</b>	Non depository Credit Intermediation
Computer Software Engineers, Applications	<b>69</b>	Computer Systems Design & Related Services
Helpers--Electricians	<b>65</b>	Building Equipment Contractors
Security Guards	<b>63</b>	Investigation & Security Services
Radio & Television Announcers	<b>63</b>	Radio & Television Broadcasting
Job Printers	<b>61</b>	Newspaper, Periodical, Book, & Directory Publs.
Janitors & Clnrs, Exc. Maids & Hsekeeping Clnrs	<b>56</b>	Services to Buildings & Dwellings
Construction Managers	<b>54</b>	Nonresidential Building Construction
Drywall & Ceiling Tile Installers	<b>54</b>	Building Finishing Contractors
Home Health Aides	<b>53</b>	Home Health Care Services
Health Technologists Tech., All Other	<b>50</b>	Outpatient Care Centers
Source: Department of Employment Services, Office of labor Market Research and Information		

## CONCLUSION

Since the start of the recession in December 2007, the nation has experienced steep job losses as economic conditions worsened. But the District's economy was sustained by non-farm job growth in four main sectors: educational and health services, federal government, other services (excluding public administration), and leisure and hospitality. Key economic indicators show continued slowing of the national economy into 2009. However, amid this recessionary environment, the District workforce investment system continues to seek ways to adapt and transform all sectors of the city's labor force into high-demand workers.

The District must be better prepared for emerging opportunities in the regional market. For example, from 2008-2018 the District is projected to add 82,858 more jobs. This growth will largely be driven by high technology occupations in professional and related services, such as network systems and data communications analysts, and computer hardware engineers, which are all expected to have growth rates of over 40 percent.

In addition, the District also enjoys higher than average salaries, with a mean hourly wage of \$38.32 and an average entry wage of \$26,567. This means that, despite the high cost of living in the District, a new worker starting at entry level can work up the ladder with education and experience.

With these factors in hand, the workforce system can direct its resources to preparing more workers to enter technology fields at all levels, and to creating as many career ladder, on-the-job training, and high-demand occupational training as possible to meet local and regional workforce needs .